

# Communication from Reception

24/10/2024 12:15 pm BST

## SMS from Reception

SMS messages can be sent direct to a client if the client has a valid mobile number registered in the clients details screen.

The number must be valid without alphabetical characters or spaces i.e. '07898880000'.

This page documents how you would send an ad hoc SMS to a client from the Reception screen.

Details

### Sending an SMS

1. Select the '**Reception**' button
2. Select the '**Send Text**' button (this button is active for any clients that have a mobile number registered).
3. The SMS text editor window will appear.

The screenshot shows the 'SMS Text Editor' window. At the top, it says 'Send Text To: Mr/Mrs Susannah Watkiss' and 'on mobile phone: 07790 123456'. Below this, there are three main sections: 'Compose Ad-Hoc SMS' on the left, 'Available Data Fields' in the middle, and 'Available SMS Templates' on the right. The 'Compose Ad-Hoc SMS' section has a large text area for writing the message, with 'Number of Characters Entered: 0' and 'Practice set limit: 611' below it. There is also a 'SMS Length Information' box with a warning about long messages and character counts. The 'Available Data Fields' section is currently empty. The 'Available SMS Templates' section shows two templates: 'Hi, unfortunately you missed your appointm...' and 'Your medication is ready for collection Thar...'. At the bottom of the window, there is a 'Communication Type' dropdown set to 'Contractual', and 'Cancel' and 'Send' buttons.

4. **Enter a message** into the field provided, or select a template from the 'Available SMS

Templates' section. Note - 1 SMS is 160 characters.

5. To send the SMS select '**Send**'.

For information on creating SMS templates see: [SMS Administration](#).

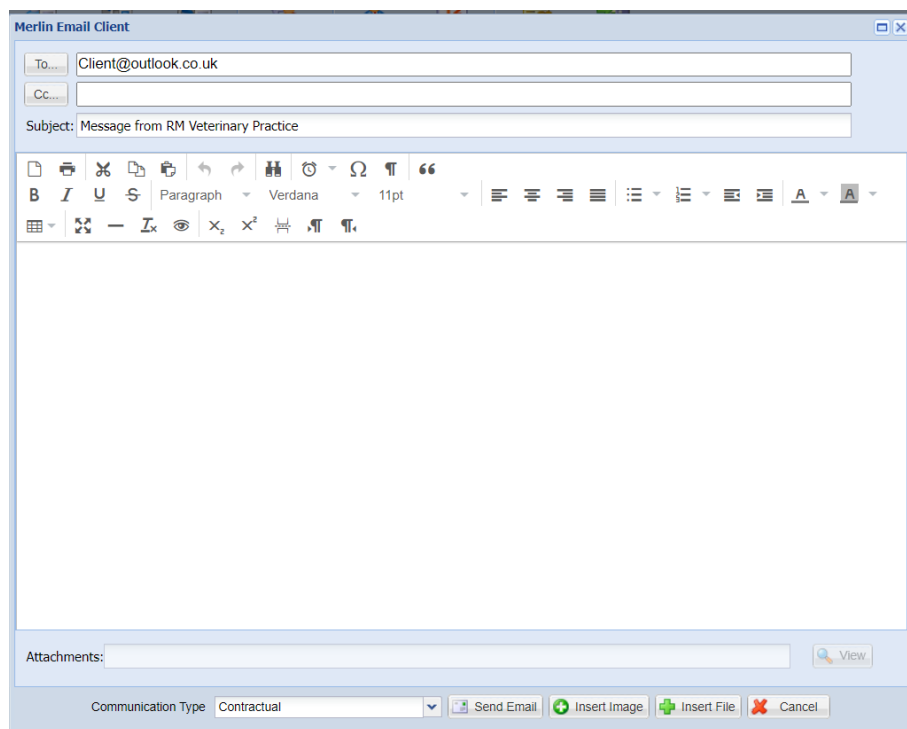
## Email from Reception

Emails can be sent direct to a client if the client has a valid email address registered in the clients' details screen.

This page documents how you would send an ad hoc email to a client from the Reception screen.

### Sending an Email

1. Enter the '**Reception**' screen and search/select a Client (with a registered email address).
2. Select the '**Send Email**' button (this button is active for any clients that have an email address registered).
3. The Merlin Email Client window will appear.



4. The '**To**' field will be pre-populated with the client's email address. (Select 'To' to display any related contacts, the full referral contact list or the full contact list.)
5. **Compose** your email and select '**Send**'.

**Note:** To insert an image or attach a file, use the buttons provided. The subject line can be overwritten, and the default text can be amended in [Settings](#).

## Contact Lookup

If you are sending the email to a different recipient/multiple recipients as per step 4, the 'Contact Lookup' functionality can be used.

1. Select the **To** button.
2. A list of email addresses related to the client will display (Any saved client email addresses and patient's registered Referral Practices).

Select Contacts

Search  Address Book Client Related Address

Contact
pentagonref@hotmail.co.uk
Simon Smith - ol@mwiah.co.uk (Email Private)
Simon Smith - testemail@gmail.com (Email Business)

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To -> ol@mwiah.co.uk

Cc ->

OK Cancel

3. You can change this list by using the address book filter.

Address Book Client Related Address

- Client Related Addresses
- Full Referral Contact List
- Full Contact List

**Client Related Addresses** = Displays Email addresses relevant to the client.

**Full Referral Contact List** = Displays all referral email Contact Details.

**Full Contact List** = Displays all contact email addresses for contacts registered in Utilities > Contact.

## Communications

To view the communication tab for a client, search for the client and select the Communication tab.

## Using the Communication Tab

The Communication tab stores a record for each time a correspondent or document is passed to the client via SMS, emails, reminder letters, statements, invoices or any other mail merge documents relating to the client.

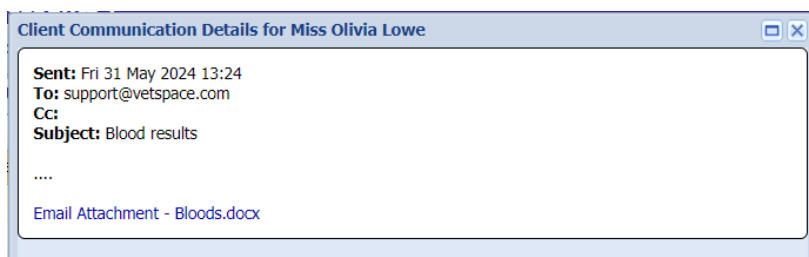
Reception [ User - jupiter : Site - Esher : Profile - Accounts ]			
Clear Save Modify Deactivate New Document Accounts Payments Appointments Del			
Client Details Additional Info Notes Documents Communication Data Consent Advanced Search			
Date Sent	Time ...	Communication	
22/10/2024	11:22	Reception email sent to client (test@test.com)	
22/10/2024	11:21	Reception text sent to client	
21/10/2024	12:07	Statement Report Printed for Accounting Period 21/10/2024 to 21/10/2024	
21/10/2024	11:52	Statement Report Printed for Accounting Period 21/10/2024 to 21/10/2024	
21/10/2024	11:45	Statement Report Printed for Accounting Period 21/10/2024 to 21/10/2024	

The communication tab only displays the information for reference and cannot be modified.

## Viewing Email communication

To open an SMS or email conversation to view content, double click on the item you wish to open.

The below window will appear with a hyperlink to the email sent to the client. Double click on the hyperlink to view the email content.



The link will open in a new tab window and the email content will display.

## Viewing SMS communication

As above, to open the communication, double click on the entry under the communication tab.

Once selected, the below window will appear with the message sent to the client.

